

FISCAL PLAN
ANNEXATION STUDY
FOR LAND CONTIGUOUS TO
CITY OF GREENWOOD, INDIANA

GREENWOOD OFFICE SUITES

APPLICANT: NEIGHBORHOOD DOWNTOWN ZONING
ASSISTANCE, INC.
REPRESENTING: YEAGER PROPERTIES, INC
OWNER: JERRY L. TAYLOR
PROPERTY LOCATION: **3209 W SMITH VALLEY ROAD**
TOTAL ACREAGE: **2.523 ACRES**

Submitted to:
GREENWOOD COMMON COUNCIL
July 5, 2006

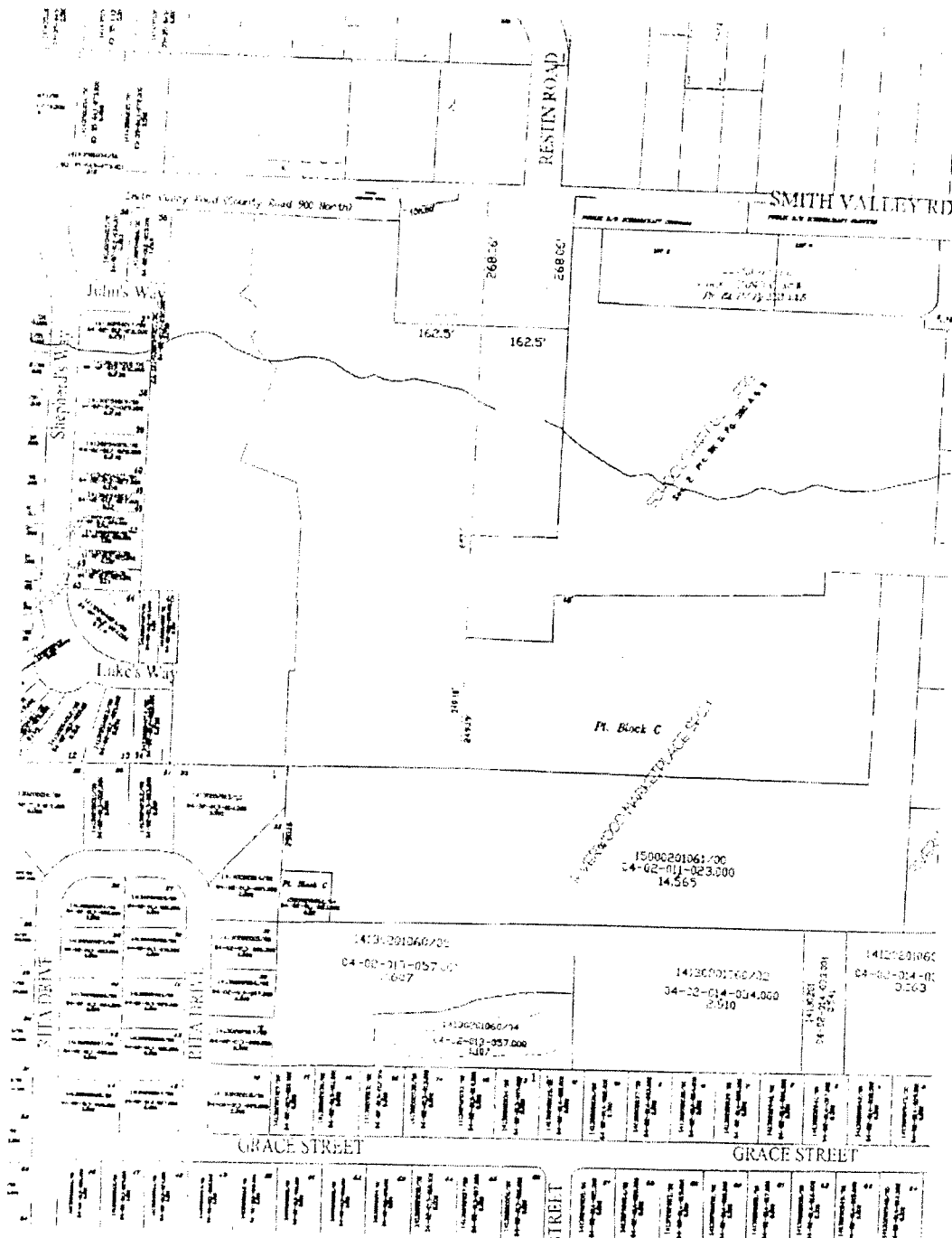


PREPARED UNDER THE DIRECTION OF
CLINTON E. FERGUSON, DIRECTOR
PLANNING, ZONING & ECONOMIC DEVELOPMENT

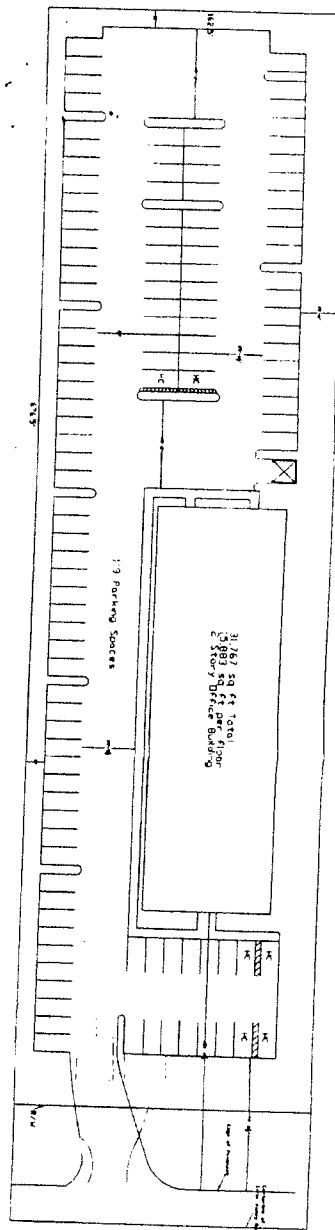
SECTION ONE INTRODUCTION

The proposed annexation consists of 2.523 acres of land which lies due south of the three way intersection of West Smith Valley Road and Restin Road. The owner, Jerry L. Taylor, as well as the applicant, Neighborhood Downtown Zoning Assistance, Inc., representing Yeager Properties, Inc. are requesting annexation with a rezoning from Johnson County R-4 to Greenwood B-1. The annexation area is contiguous on eastern and southern boundary line. The developer is proposing a two story office building with a total of 31,767 square feet. To service the planned development, the petitioner requires the municipal service that the City of Greenwood provides.

The following map gives a graphic orientation of the annexation area:



Site Plan
Scale: 1" = 40'



Site Plans

Yeager Construction Company
23 South 8th Street
Noblesville, IN 46060
317-770-7380

Project: Greenwood Office Suites
Location: 3209 W Smith Valley Road
Owner: Yeager Properties
Date: 4/26/06

SECTION TWO
LEGAL DESCRIPTIONS/ZONING CLASSIFICATIONS

PROPERTY KNOWN AS 3209 WEST SMITH VALLEY ROAD

TRACT 1: PART OF THE NORTHWEST QUARTER OF THE NORTHEAST QUARTER OF SECTION 2, TOWNSHIP 13 NORTH, RANGE 3 EAST OF THE SECOND PRINCIPAL MERIDIAN, DESCRIBED AS FOLLOWS, TO WIT:

BEGINNING ON THE EAST LINE OF SAID QUARTER QUARTER SECTION AT A POINT 268.06 FEET SOUTH OF THE NORTHEAST CORNER THEREOF; THENCE SOUTH ON AND ALONG SAID EAST LINE 408.44 FEET; THENCE WEST PARALLEL TO THE NORTH LINE OF SAID QUARTER QUARTER SECTION 162.523 FEET; THENCE NORTH PARALLEL TO THE EAST LINE OF SAID QUARTER QUARTER SECTION 408.44 FEET; THENCE EAST 162.50 FEET TO THE PLACE OF BEGINNING, CONTAINING 1.523 ACRES, MORE OR LESS.

TRACT 2: PART OF THE NORTHWEST QUARTER OF THE NORTHEAST QUARTER OF SECTION 2, TOWNSHIP 13 NORTH, RANGE 3 EAST, DESCRIBED AS FOLLOWS, TO WIT: BEGINNING AT THE NORTHEAST CORNER THEREOF; THENCE SOUTH 268.06 FEET; THENCE WEST 162.50 FEET; THENCE NORTH 268.06 FEET; THENCE EAST 162.50 FEET TO THE PLACE OF BEGINNING, CONTAINING (1) ONE ACRE, MORE OR LESS.

SECTION THREE AREA DESCRIPTION

1. General Location and Uses:

The 2.523-acre area proposed for annexation is located at the south side of the three way intersection of West Smith Valley Road and Restin Road, west of the Home Depot location. Rezoning from Johnson County R-4 to Greenwood B-1 Business is being requested. The conceptual plan shows a two story office building with approximately 31,767 square feet.

2. Population/Subdivision Densities

A. Residential Portion:

There is one existing home in the annexation area. This home is to be demolished. No future residential development is proposed for this annexation area.

B. Population Estimates:

N/A

3. Contiguity:

The perimeter boundary of the annexation area totals approximately 1,678 lineal feet. Approximately 839 lineal feet are contiguous to existing city boundaries. Thus, the annexation area is approximately 50% contiguous, exceeding the 12.5% minimum required by state law.

4. Zoning:

Current zoning classification is Johnson County R-4. The petitioner is requesting rezoning to Greenwood B-1 Business.

SECTION FOUR UTILITIES & GOVERNMENTAL SERVICES

A. Existing Utilities Services

1. Water:

Bargersville Water Company, a municipally owned public utility, provides public water supply in the area.

2. Fire Hydrants:

The same properties served by public water mains are served by fire hydrants spaced throughout the developed areas.

3. Natural Gas:

Natural gas services are provided to this area by Vectren Gas Company, a privately owned public utility. The entire area has gas availability.

4. Electricity:

Electrical services are currently provided by Duke Energy, a privately owned public utility.

5. Telephone:

Telephone services are currently provided by AT & T, a privately owned public utility.

6. Sanitary Sewers:

The proposed annexation area is currently within the area to be served by Greenwood Sanitation Department, a municipal utility. This property is currently served by sanitary sewers. The developer will be responsible for extending sewers.

B. Existing Governmental Services

1. Planning, Zoning, Building

The annexation area is currently within Johnson County's jurisdiction. This includes such services as planning, zoning and building permits.

2. Police:

The Johnson County Sheriff's Department serves the annexation area. The JCSD is headquartered at the Johnson County Jail in Franklin.

3. Fire:

The White River Fire Department provides primary fire protection for the annexation area.

4. Emergency Medical Services:

The primary providers of ambulance and first aid services to the annexation area are White River Fire Department, Rural Metro Ambulance Service, a privately owned company, and Johnson County Hospital. Other private providers occasionally serve the area.

5. **Solid Waste Collection:**

The City of Greenwood provides solid waste removal and leaf and limb pick up for single-family residential areas that are within the City limits of Greenwood. The City does not provide collection services for non-residential uses.

6. **Streets:**

Smith Valley Road is the primary street which serves the annexation area. This portion of Smith Valley Road is currently maintained by Johnson County Highway Department.

7. **Traffic Control:**

Smith Valley Road is currently under Johnson County Sheriff's Department's jurisdiction.

8. **Street Lighting:**

No street lights exist at this time.

9. **Parks:**

The closest city parks to the annexation area is Woodmen Park which is located off Smith Valley Road and Clearview Drive. There are no county parks in the area. The closest county parks are Camp Atterbury in southern Johnson County and Independence Park located in White River Township.

10. **General Administrative Functions:**

The Johnson County Council and Johnson County Commissioners have jurisdiction over this area and provide administrative services. Johnson County elected officials are located in Franklin.

11. **Schools and Libraries:**

The properties in the annexation area are within the Center Grove School District and the Johnson County Public Library District.

SECTION FIVE PLAN TO PROVIDE MUNICIPAL SERVICES

State law requires that within one (1) year of annexation, the City will provide the annexed areas with "planned services of a non-capital nature" which are "equivalent in standard and scope" to those non-capital services provided to similar areas within the city. The law requires "that services of a capital improvement nature . . . be provided within three (3) years of the effective date of the annexation, in the same manner as those services are provided" to similar areas within the city. Cost estimates of the services, methods of financing the services, and a plan for the organization and extension of services are also required (IC 36-4-3-13 (d)). This section contains such a plan.

Municipal services are analyzed in terms of the needs of the annexation area and the costs of providing those services to these areas. As required by Indiana law, services will be provided in a manner that treats the annexation areas the same way as other areas in the city are treated. Services will be at city standard for similar areas and, where necessary for items such as new utility service, the standard service provisions processes will be used as they are used elsewhere in the city.

This is a plan to provide municipal services, which the City of Greenwood is committed to do. The exact implementation details may change as needs are re-evaluated and services re-allocated throughout the entire city. Standard city policy could also change, necessitating change in the manner and amount of service provided. Regardless of any change of details, the municipal services will be provided to the annexation areas in the same manner and level that they are provided elsewhere in the city.

1. Police:

The Greenwood Police Department (GPD) will become responsible for servicing the area immediately upon annexation. The GPD has a full-time force of 54; (76 including sworn officers and other department personnel at the present time). The city's estimated population is 36,037. Thus, the current level of service is a ratio of approximately 1.5:1000. The level of service typical of mid-size cities in the Midwest is approximately 2:1000, according to FBI Uniform Crime Report. The level of service ratio for total department personnel is approximately 2.1:1000.

The total budget for 2006 police services (combined budgets for Police Department, Police Pension Fund, and Police Merit Board) is \$5,479,175. With a total of 76 full-time employees, the 2006 average annual cost is \$67,548.

This development will be commercial only. There is no estimated population. Police services will be very minimal.

2. Fire

The White River Fire Department provides fire protection services to the annexation area. The area is not within the boundaries of the Greenwood Fire Department district. After annexation, the area will remain within the boundaries of White River Township Fire Department.

3. Emergency Medical Services:

The White River Fire Department and private companies will provide the annexation area with emergency medical services.

4. Fire Hydrants:

The location of fire hydrants is directly related to the location of public water supply mains. Currently there are no fire hydrants in the annexation area. Hydrants will be installed by developer during construction. Customers will be billed pro-rated monthly fees on their water bills to cover hydrant costs.

5. Other Private Utilities:

Natural gas, electricity, telephone and public water supply services are provided to the area by private companies. The annexation of this area will have no effect upon the costs or level of service of these utilities. These utilities will continue to be available to area property owners subject to the policies of the individual utility companies and the Utility Regulatory Commission.

6. **Leaf Pick-up & Trash Removal:**

The City of Greenwood provides leaf/limb and trash removal to residential areas upon annexation. The City does not provide collection services for non-residential uses.

7. **Sanitary Sewers:**

ANNEXATION DOES NOT GUARANTEE THE AVAILABILITY OF SANITARY SEWER. That availability is subject to review and approval by the Greenwood Board of Public Works and Safety. If capacity is determined to be available the developer will install the sanitary sewers to city specifications. Upon acceptance of sanitary sewers the city will provide maintenance and service as in other areas of the city.

8. **Traffic Control:**

Responsibilities for traffic control by the Greenwood Police Department are included in the costs and services in item 1 (Police) of this section. The owner/developer will provide the regulatory signage and street markings within the proposed residential development.

9. **Streets:**

Smith Valley Road is the primary street that serves the annexation area. Smith Valley Road will become the responsibility of the City of Greenwood Street Department. Any interior streets will be privately maintained by the developer / owner.

10. **Parks:**

The closest city parks to the annexation area is Woodmen Park located at Smith Valley Road and Clearview Drive. There are no county parks in the area. The closest county parks are Independence Park located in western Johnson County, north of Stones Crossing on Morgantown Road, and Camp Atterbury in southern Johnson County. The new Parks & Recreation Master Plan does recognize the need for park development in this area. Considerations are being made in the near future to serve this area.

11. **Planning/Zoning Administration:**

Upon annexation the area will be under the jurisdiction of the Greenwood Advisory Plan Commission and the Greenwood Planning and Zoning Department.

12. **General City Administration:**

Upon annexation, citizens and property owners in this area will be represented by the elected and appointed officials of the City of Greenwood. Elected officials include the Mayor, 7-member Common Council, Clerk-Treasurer and City Judge. Citizens will also be served by the other appointed city boards and commissions, including: Board of Public Works and Safety, Plan Commission, Board of Zoning Appeals, Economic Development Commission, Park and Recreation Board, Police Merit Commission, and the Board of Aviation Commissioners.

Citizens will benefit from direct participation and representation in city government. This area will be part of Councilmanic District #5. The Department of Planning & Zoning recommends that the City assign the subject area to Councilmanic District #5 upon annexation into the City of Greenwood.

13. **Schools and Libraries:**

Taxing districts and boundaries for schools and libraries are completely independent and unaffected by the annexation. Therefore, this annexation will have no effect upon schools or libraries areas of jurisdiction.

14. Hiring Plan:

It is anticipated that this annexation will not result in the elimination of jobs for employees of other governmental entities, but in the event it does, then the Mayor of the City of Greenwood is directed to assist these employees in the obtaining of new employment. However, the City will not be required to hire any of these individuals.

In the event of unforeseen elimination of jobs, the Mayor shall take the application of any such employee and maintain a special file of these applications. Each application will be forwarded to major employers in the area and to any City department having a job opportunity for which the individual is qualified. Each individual will also be referred to the Indiana Department of Work Force Development.

15. Councilmanic District Assignment

The subject land is contiguous on the north side with Councilmanic District #5. The Department of Planning and Zoning recommends that the City assign the subject area to **Councilmanic District #5** upon annexation into the City of Greenwood.

SECTION SIX FINANCIAL IMPACT/ FISCAL PLAN

This section contains estimates of both receipts and expenditures projected for a five-year period for the annexation area.

The projections for revenue receipts are based upon the petitioner's development plan which in turn is based upon available capacity and connection to the sanitary sewer system. The proposed zoning requested is B-1 Business. An average assessed value for square footage, as well as acreage was determined by information gathered from the Johnson County Assessor's office. All commercial projects used are located on SR 135 in White River Township, with a zoning classification of B-1. The rates for the various revenue sources were obtained from the Budget Bulletin of the Indiana Association of Cities and Towns, State Board of Tax Commissioner.

The projections for expenditures were based upon 2006 budgets and rates that the city pays for various services. Detailed explanations of the estimates are found following each of the tables. Expenditures, like revenue projections, are based upon the petitioner's development plan (i.e. dependent upon sanitary sewer capacity.)

5-YEAR POPULATION ESTIMATES — RESIDENTIAL			
	UNITS ADDED	FACTOR	POPULATION ADDED
YEAR 1	N/A	2.5	0
YEAR 2	N/A	2.5	0
YEAR 3	N/A	2.5	0
YEAR 4	N/A	2.5	0
YEAR 5	N/A	2.5	0
TOTAL	N/A	2.5	0

PROJECTED RECEIPTS BASED ON THE FOLLOWING:

1. **Property Taxes:**
 - A. Existing Parcel Actual Assessed Valuation:

Residence & Land Only (2.523 acres)	\$ 97,700
-------------------------------------	-----------
 - B. Comparables Used

Building	(Approx. 31,767 sq. ft.)	\$ 83.60 per sq. ft.
Land	(Approx. 2.52 acres)	\$ 62,469 per acre
 - C. 2006 City Tax Rate = \$.35 per \$100 total assessed valuation (does not include Greenwood Fire Rate)
2. **Alcoholic Beverage Tax** = \$ 2.01 per capita
3. **Cigarette Tax** = \$ 4.43 per capita
4. **Liquor Excise Tax** = \$ 2.01 per capita
5. **Motor Vehicle Highway Fund** = \$ 40.85 per capita
6. **Local Road and Street Fund** = \$ 12.56 per capita

B-1 BUSINESS ESTIMATED REVENUE 2.52 Acres					
REVENUE SOURCE	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
PROPERTY TAXES	342	9,845	9,845	9,845	9,845
ALCOHOLIC BEV. TAX	N/A	N/A	N/A	N/A	N/A
CIGARETTE TAX	N/A	N/A	N/A	N/A	N/A
LIQUOR TAX	N/A	N/A	N/A	N/A	N/A
MOTOR VEHICLE HWY.	N/A	N/A	N/A	N/A	N/A
LOCAL ROAD & STREET	N/A	N/A	N/A	N/A	N/A
TOTAL	342	9,845	9,845	9,845	9,845

EXPENDITURES BASED ON THE FOLLOWING:

1. Police

- A. Total 2006 Police Budget = \$ 5,479,175 (Police Dept., Merit Board, Pension Fund)
- B. \$ 5,479,175/76 (GPD employees) = \$72,094 cost per employee per year.
- C. Current level of service = 2.1 employees per 1,000 population
- D. Expenditures to be funded by city annual budget appropriations.

2. Fire

- A. Total 2006 Fire Budget = \$3,535,277
- B. \$3,535,277/108 (GFD full and part-time employees) = \$32,734 cost per employee
- C. Level of Service = 1.25 employees per 1,000 population
- D. Annexation area will remain within White River Volunteer Fire Department's jurisdiction.

3. Fire Hydrants:

- A. Fire hydrant fees are charged as pro-rated monthly fees on customer's water bills.

4. Street Maintenance:

- A. Total 2006 Street Budget (MVH fund) = \$ 1,472,259
Local Road & Street Fund (LRS fund) = \$ 452,559
TOTAL = \$ 1,924,818
- B. Total Street Mileage = 174 miles
- C. \$1,924,818/174 miles = \$11,062 avg. per mile maintenance cost.
- D. Interior streets within all of the commercial area will be privately maintained

5. Street Lighting:

- A. Current billing rate = \$ 9.58 per month per light (avg. cost Johnson County REMC)
- B. All street lighting within the commercial areas will be privately maintained and of no cost to the City upon annexation.

2.5 ACRE PARCEL – B-1 ZONING REQUESTED					
	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
POLICE	N/A	1,000	1,000	1,000	1,000
FIRE	N/A	N/A	N/A	N/A	N/A
EMS	N/A	N/A	N/A	N/A	N/A
HYDRANTS	N/A	N/A	N/A	N/A	N/A
SEWERS	N/A	N/A	N/A	N/A	N/A
STREETS— .03 miles	N/A	331	331	331	331
LIGHTS	N/A	N/A	N/A	N/A	N/A
PARKS*	N/A	N/A	N/A	N/A	N/A
PLANNING	N/A	N/A	N/A	N/A	N/A
ADMINISTRATION	N/A	N/A	N/A	N/A	N/A
TOTAL	N/A	1,331	1,331	1,331	1,331

Estimated expenditures projected for this commercial tract are minimal.

	PROJECTED RECEIPTS	PROJECTED EXPENDITURES	PROJECTED BALANCE
YEAR 1	\$342	N/A	\$342
YEAR 2	\$9,845	\$1,331	\$8,511
YEAR 3	\$9,845	\$1,331	\$8,511
YEAR 4	\$9,845	\$1,331	\$8,511
YEAR 5	\$9,845	\$1,331	\$8,511
TOTAL	\$39,722	\$5,324	\$34,386

SECTION SEVEN SUMMARY & RECOMMENDATIONS

I. Indiana Annexation Statutes

In order for a city to successfully annex an area, it must meet the necessary criteria for annexation as established by Indiana Statutes IC 36-4-3-1 through IC 36-4-3-21, inclusive.

The criteria include:

1. IC 36-4-1.5 - Contiguity

Criteria: territory sought to be annexed may be considered "contiguous" only if at least one-eighth (1/8) of the aggregate external boundaries of the territory coincides with the boundaries of the annexing municipality.

Response: The area is 50 % contiguous which exceeds the one-eighth requirement.

2. IC 36-4-3-5 Private lands; petition requesting ordinance to annex; filing; proceedings.

Criteria: Sec. 5 (a) If the owners of land located outside of but contiguous to a municipality want to have territory containing that land annexed to the municipality, they may file with the legislative body of the municipality a petition:

- (1) signed by at least:
 - (A) fifty-one percent (51%) of the owners of land in the territory sought to be annexed; or
 - (B) the owners of seventy-five percent (75%) of the total assessed value of the land for property tax purposes; and
- (2) requesting an ordinance annexing the area described in the petition.

Response: This is a voluntary request for annexation filed by the landowner which the Greenwood Common Council will grant upon adoption of the annexation ordinance.

Criteria: The requirements of subsection (d) are met if: "the evidence establishes that the municipality has developed a written fiscal plan and has established a definite policy, by resolution of the legislative body, as of the date of passage of the annexation ordinance.

The resolution must show:

- (1) the cost estimates of planned services to be furnished to the territory to be annexed;
- (2) the method or methods of financing the planned services;
- (3) the plan for the organization and extension of services;
- (4) that planned services of a non-capital nature . . . will be provided to the annexed territory within one (1) year after the effective date of annexation, and . . . in a manner equivalent in standard and scope . . . provided to areas within the corporate boundaries.
- (5) that services of a capital improvement nature . . . will be provided to the annexed territory within three (3) years after the effective date of the annexation, in the same manner as those services are provided to areas within the corporate boundaries . . . ; and
- (6) the plan for hiring the employees of other governmental entities whose jobs will be eliminated by the proposed annexation, although the municipality is not required to hire any employees.

Response:

- (1) Cost estimates for planned services are contained in Section Six.
- (2) The methods (revenue source) of financing the planned services are contained in Section Six of this report.
- (3) The plan for extension of services is contained in Section Five of this report.

- 4) Services of a non-capital nature will be provided to the annexation areas immediately upon the effective date of annexation and in the equivalent manner within one year as provided other areas of the city. Planned non-capital services include police protection, street maintenance, traffic control, street lighting, general city administration, park and recreation services, and planning and zoning. Other private utility services include water, natural gas, electricity and telephone.
- 5) Services of a capital nature will be provided to the annexed area within 3 years after the effective date in the same manner those services are provided to areas within the corporate boundaries. Sewer availability will be determined upon annexation.
- 6) It is anticipated that this annexation will not result in the elimination of jobs for employees of other governmental entities, but in the event it does, then the Mayor of the City of Greenwood is hereby directed to assist such employee in obtaining new employment, but nothing herein shall require the City to hire such employee.

III. Plan Commission Review and Recommendation:

The Greenwood Advisory Plan Commission accepted a petition by the Neighborhood Downtown Zoning Assistance, Inc., representing Yeager Properties, and Jerry L. Taylor, owner, to consider the annexation of the proposed area. The Plan Commission considered: 1) the information contained in the preliminary draft of this plan; 2) the statutory criteria for annexation and zoning classification; 3) staff comments and recommendations; 4) oral and written comments from remonstrators and property owners; and 5) the official annexation policy of the city. At the conclusion of a public hearing held **June 26, 2006** the Plan Commission granted a favorable/unfavorable recommendation forwarded and certified to the Greenwood Common Council. The Plan Commission's vote was ____ to ____ for/against the annexation and rezoning from Johnson County R-4 to Greenwood B-1 for the 2.523 acre tract.

The proposed annexation area is a logical extension of the city. The subject area meets or exceeds state and local criteria for annexation. Annexation of this area will help the city grow in a logical and orderly manner, as well as helping to preserve a solid tax base.

Annexation of this area will help square-up the city's corporate limits. Private utilities will provide water, natural gas, electricity, telephone services to the area. Annexation does not guarantee sanitary sewer capacity. The availability of sanitary sewers must be determined by the Board of Public works and Safety in order for development to occur. The timetable for a determination on sanitary sewer capacity is based upon several factors which are not within the cities control.

IV. Common Council Consideration and Adoption:

The Greenwood Common Council, like the Greenwood Advisory Plan Commission, has also given consideration to: 1) the contents and policies of this plan; 2) the statutory criteria for annexation and zoning classification; 3) staff comments and recommendation; 4) oral and written comments from remonstrators and property owners; and 5) the official annexation policy of the city.

Based upon the considerations enumerated above, the Greenwood Common Council adopted this plan by reference in Resolution No. 2006-____, adopted on the _____ day of _____, 2006.

City services shall be extended to the annexed area as provided in Section Five - Plan to provide Municipal Services of this annexation study.